

TRAINING WEEK 4 - CASE SCENARIO – ADT (ADMISSION, DISCHARGE AND TRANSFER)

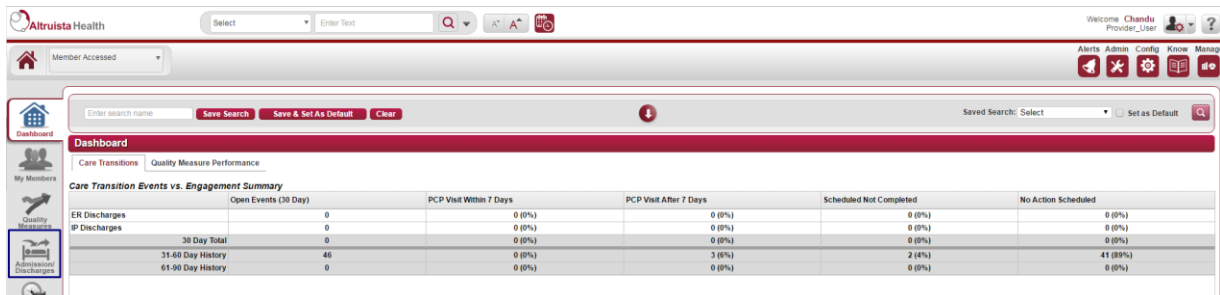
The fourth week of Care Coordination Tool training will focus on the ADT tab (Admission, Discharge and Transfer).

After this self-guided training, you should be able to perform the following functions:

1. Engage a Member in Care Transition
2. View Required Activities
3. Export ADT to Excel
4. Sort Members by Risk

1. Engage a Member in Care Transition.

When a provider logs in, the dashboard page appears as shown below:

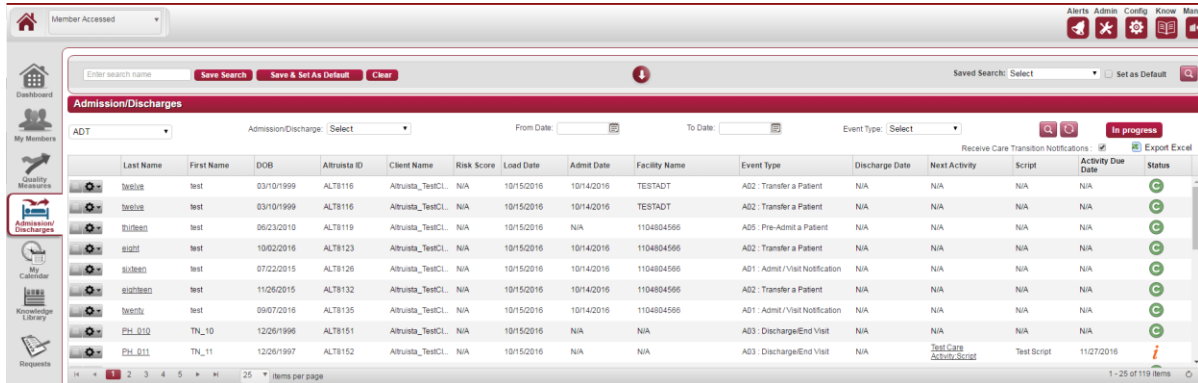


The screenshot shows the Altruista Health dashboard. The 'Admission/Discharge' tab is highlighted in the left sidebar. The main content area displays a table titled 'Care Transition Events vs. Engagement Summary'.

	Open Events (30 Day)	PCP Visit Within 7 Days	PCP Visit After 7 Days	Scheduled Not Completed	No Action Scheduled
ER Discharges	0	0 (0%)	0 (0%)	0 (0%)	0 (0%)
IP Discharges	0	0 (0%)	0 (0%)	0 (0%)	0 (0%)
30 Day Total	0	0 (0%)	0 (0%)	0 (0%)	0 (0%)
31-60 Day History	46	0 (0%)	3 (4%)	2 (4%)	41 (89%)
61-90 Day History	0	0 (0%)	0 (0%)	0 (0%)	0 (0%)

Click the **Admission/Discharge Tab**.

The Admission/Discharge tab displays the Members who have had ER admissions and discharges.



Last Name	First Name	DOB	Altruista ID	Client Name	Risk Score	Load Date	Admit Date	Facility Name	Event Type	Discharge Date	Next Activity	Script	Activity Due Date	Status
test	test	03/10/1999	ALT8116	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTADT	A02 : Transfer a Patient	N/A	N/A	N/A	N/A	⚠
test	test	06/23/2010	ALT8119	Altruista_TestCL	N/A	10/15/2016	N/A	1104804566	A05 : Pre-Admit a Patient	N/A	N/A	N/A	N/A	i
test	test	10/02/2016	ALT8123	Altruista_TestCL	N/A	10/15/2016	10/14/2016	1104804566	A02 : Transfer a Patient	N/A	N/A	N/A	N/A	C
test	test	07/22/2015	ALT8126	Altruista_TestCL	N/A	10/15/2016	10/14/2016	1104804566	A01 : Admit /Visit Notification	N/A	N/A	N/A	N/A	C
test	test	11/06/2015	ALT8132	Altruista_TestCL	N/A	10/15/2016	10/14/2016	1104804566	A02 : Transfer a Patient	N/A	N/A	N/A	N/A	C
test	test	09/07/2016	ALT8135	Altruista_TestCL	N/A	10/15/2016	10/14/2016	1104804566	A01 : Admit /Visit Notification	N/A	N/A	N/A	N/A	C
Phd_010	TN_10	12/06/1996	ALT8151	Altruista_TestCL	N/A	10/15/2016	N/A	N/A	A03 : Discharge/End Visit	N/A	N/A	N/A	N/A	C
Phd_011	TN_11	12/06/1997	ALT8152	Altruista_TestCL	N/A	10/15/2016	N/A	N/A	A03 : Discharge/End Visit	N/A	Test Case Activity Script	Test Script	11/27/2016	i

The Status of Members being engaged into Care Transition Programs appear as follows:



: Member is not engaged in a Care Transition Program



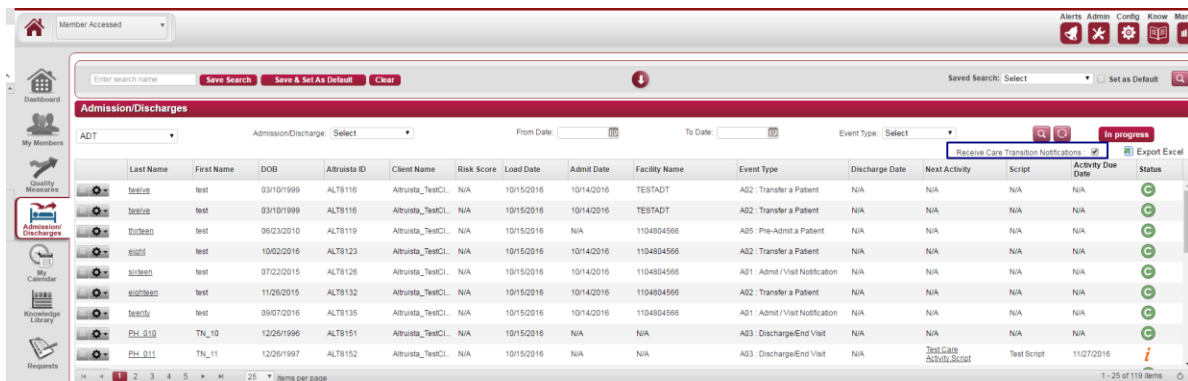
: Member is engaged in Care Transition Program



: Member has completed the Care Transition Program

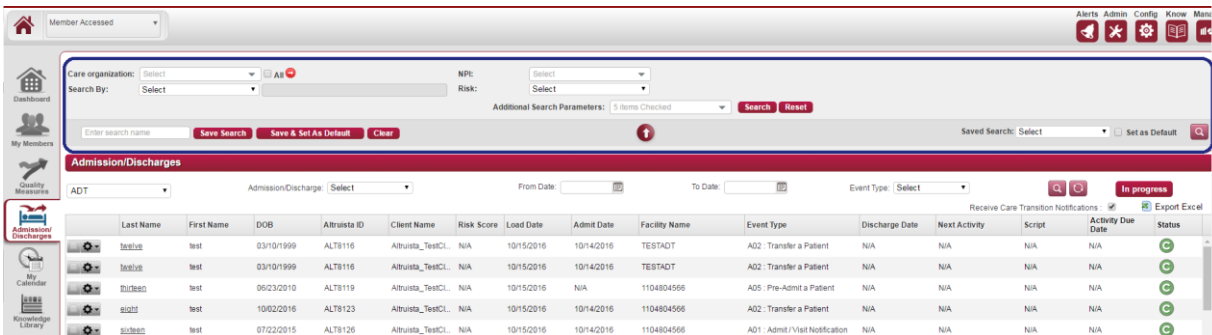


Select **Receive Care Transition Notifications** check box seen at the top right corner of the page to be able to receive Alerts/Notifications to the registered email address of the Provider.



Last Name	First Name	DOB	Altruista ID	Client Name	Risk Score	Load Date	Admit Date	Facility Name	Event Type	Discharge Date	Next Activity	Script	Activity Due Date	Status
test	test	03/10/1999	ALT8116	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTADT	A02 : Transfer a Patient	N/A	N/A	N/A	N/A	⚠
test	test	03/10/1999	ALT8116	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTADT	A02 : Transfer a Patient	N/A	N/A	N/A	N/A	i
test	test	06/23/2010	ALT8119	Altruista_TestCL	N/A	10/15/2016	N/A	1104804566	A05 : Pre-Admit a Patient	N/A	N/A	N/A	N/A	C
test	test	10/02/2016	ALT8123	Altruista_TestCL	N/A	10/15/2016	10/14/2016	1104804566	A02 : Transfer a Patient	N/A	N/A	N/A	N/A	C
test	test	07/22/2015	ALT8126	Altruista_TestCL	N/A	10/15/2016	10/14/2016	1104804566	A01 : Admit /Visit Notification	N/A	N/A	N/A	N/A	C
test	test	11/06/2015	ALT8132	Altruista_TestCL	N/A	10/15/2016	10/14/2016	1104804566	A02 : Transfer a Patient	N/A	N/A	N/A	N/A	C
test	test	09/07/2016	ALT8135	Altruista_TestCL	N/A	10/15/2016	10/14/2016	1104804566	A01 : Admit /Visit Notification	N/A	N/A	N/A	N/A	C
Phd_010	TN_10	12/06/1996	ALT8151	Altruista_TestCL	N/A	10/15/2016	N/A	N/A	A03 : Discharge/End Visit	N/A	N/A	N/A	N/A	C
Phd_011	TN_11	12/06/1997	ALT8152	Altruista_TestCL	N/A	10/15/2016	N/A	N/A	A03 : Discharge/End Visit	N/A	Test Case Activity Script	Test Script	11/27/2016	C

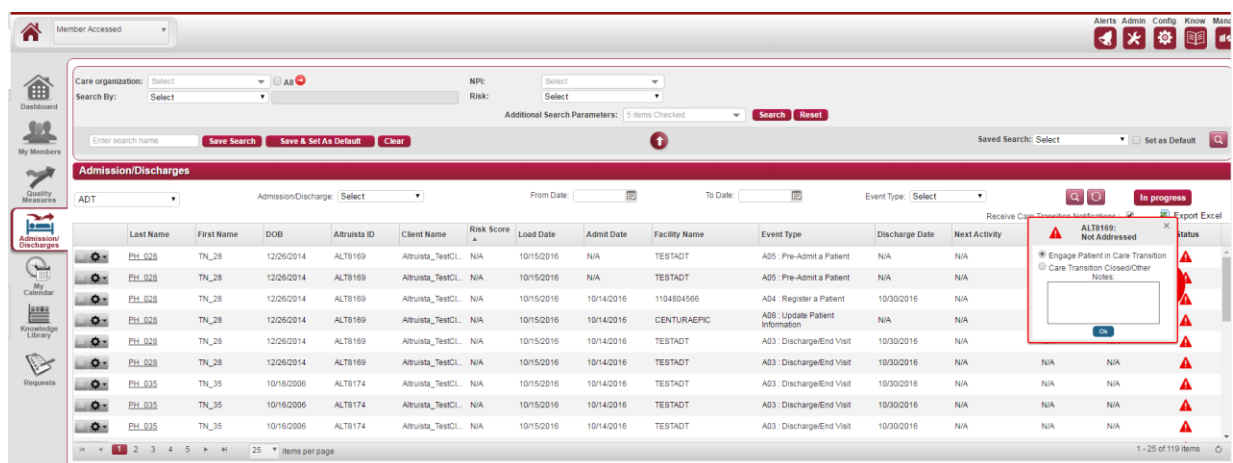
Select Care Organization (multi-select checkboxes), Program and Program Status from the drop-down or you can select the search name from the Saved Search drop-down, if you would like to look for members with specific search parameters which were saved earlier.



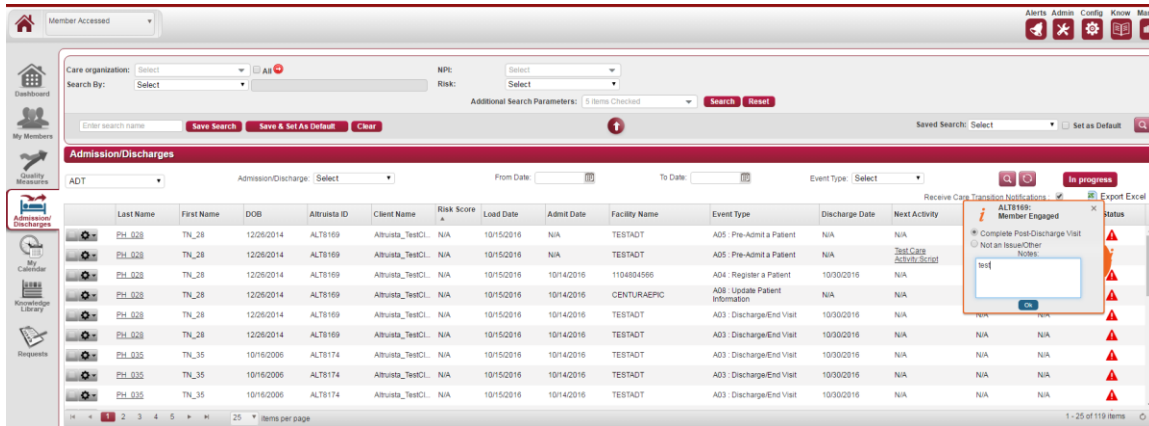
You can also search for Members by selecting the **Admission/Discharge** drop down, and entering a **From Date**, **To Date** and **Event Type**.

To search for a **specific** member, search with **Member Name** or **Member ID**. Click **Search**. Search results appear.

Click the **Red Triangle** to engage the selected Member into a Care Transition Program.



Select the option **Engage Patient in Care Transition**, enter notes if required and click **OK**, or Select **Care Transition Closed/Other**.



The screenshot displays the 'Admission/Discharges' section of the Altruista Health Care Coordination Tool. The table lists patient records with columns for Last Name, First Name, DOB, Altruista ID, Client Name, Risk Score, Load Date, Admit Date, Facility Name, Event Type, Discharge Date, Next Activity, and Status. A context menu is open for the first row, showing options like 'Complete Post-Discharge Visit' and 'Not an Issue/Other Notes'. The status of the record is 'Member Engaged'.



If you have selected Engage Patient in Care Transition, the status of the ADT record changes from Not Addressed to Member Engaged.

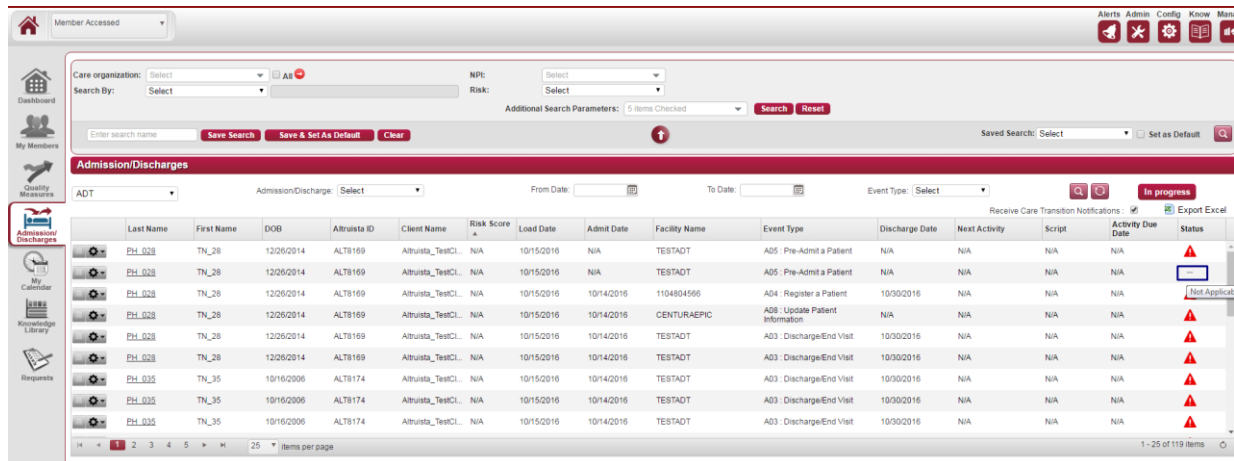
Note: If you want to add an activity/appointment for the member, it can be done from the context menu options, seen next to the last name column (click on sprocket with drop down arrow).

If you have selected Care Transition Closed/Other, Status changes from Not Addressed to Completed.

To complete a post discharge visit, click . Select the option Complete Post Discharge Visit.

Click OK. The ADT status will change from Care Transition Completed () to Completed ().

If you have selected Not an Issue/Other, the status changes from Care Transition Completed () to Not Applicable ().

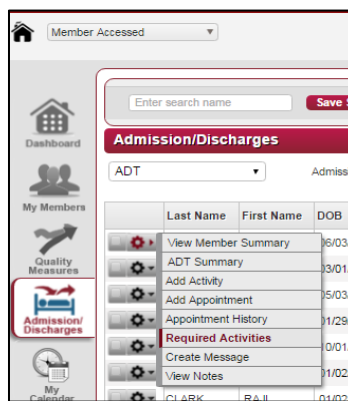



The screenshot displays the 'Admission/Discharges' section of the Altruista Health Care Coordination Tool. The table lists patient records with columns for Last Name, First Name, DOB, Altruista ID, Client Name, Risk Score, Load Date, Admit Date, Facility Name, Event Type, Discharge Date, Next Activity, Script, Activity Due Date, and Status. The status of the first row is 'Not Applicable'.




2. View Required Activities

When a Member is engaged in a Care Transition Program, the Program-specific Required Activities are displayed.

To view the Required Activities for a Member, select Required Activities from the context menu (click on sprocket with drop down arrow – see below).

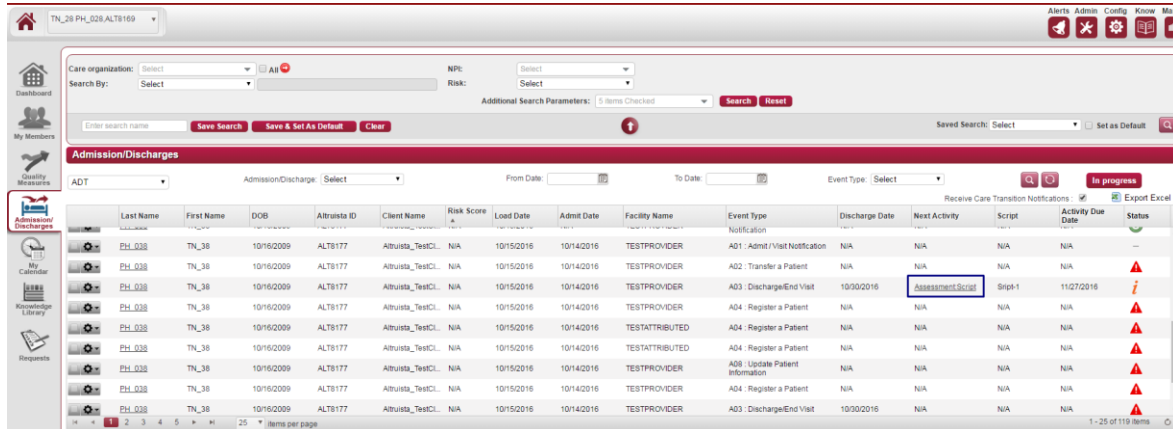


Click **Required Activities**. The Required Activities pop-up window will appear, displaying the activities as well as the Due Date and the icon  that will enable you to perform the Activity.

REQUIRED ACTIVITIES					
Program Enrollment					
Plan Name	Program Name	Activity Type	Script Name	Due Date	
Enrollment	TOC Program	Care Coordination	N/A	09/29/2016	
		Care Coordination	N/A	10/29/2016	
		Care Coordination	N/A	11/28/2016	

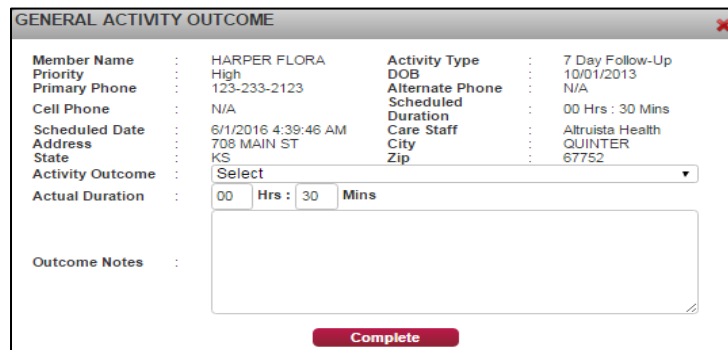
Required Activities are pre-configured therefore when you engage a member in a Care Transition program, the status changes from **Not Addressed** to **Care Transition Completed** and the pre-configured Required Activities are displayed in the Required Activities section.

The Required Activity that must be performed next (according to the **Due Date**) is also displayed in the ADT grid under the **Next Activity** column as shown.



	Last Name	First Name	DOB	Altruista ID	Client Name	Risk Score	Load Date	Admit Date	Facility Name	Event Type	Discharge Date	Next Activity	Script	Activity Due Date	Status
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTPROVIDER	A01 - Admit / Visit Notification	N/A	N/A	N/A	N/A	—
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTPROVIDER	A02 - Transfer a Patient	N/A	N/A	N/A	N/A	▲
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTPROVIDER	A03 - Discharge/End Visit	10/30/2016	Assessment Social	Slipk-1	11/27/2016	i
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTPROVIDER	A04 - Register a Patient	N/A	N/A	N/A	N/A	▲
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTATTRIBUTED	A04 - Register a Patient	N/A	N/A	N/A	N/A	▲
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTATTRIBUTED	A04 - Register a Patient	N/A	N/A	N/A	N/A	▲
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTPROVIDER	A08 - Update Patient Information	N/A	N/A	N/A	N/A	▲
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTPROVIDER	A04 - Register a Patient	N/A	N/A	N/A	N/A	▲
PH_038	TN_38		10/16/2009	ALT8177	Altruista_TestCL	N/A	10/15/2016	10/14/2016	TESTPROVIDER	A03 - Discharge/End Visit	10/30/2016	N/A	N/A	N/A	▲

You can click on the Activity hyperlink displayed under **Next Activity** column to perform the Activity. Clicking on the hyperlink displays the **General Activity Outcome** pop-up window (if it is general activity).



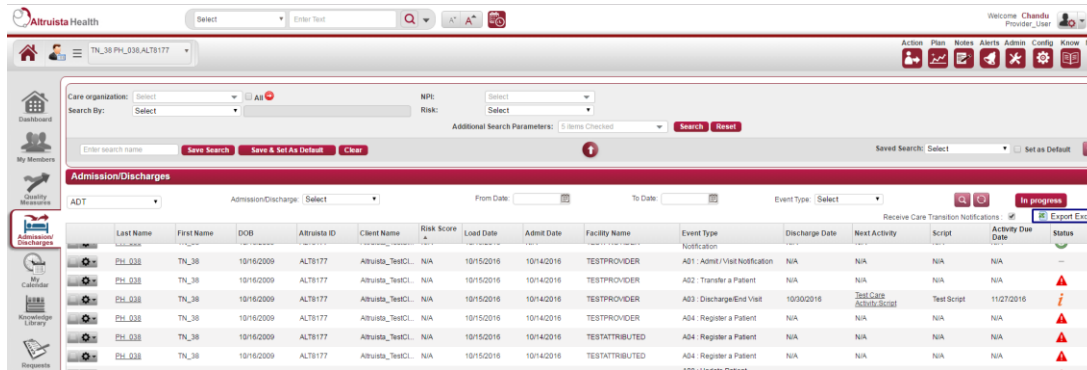
Member Name	HARPER FLORA	Activity Type	7 Day Follow-Up
Priority	High	DOB	10/01/2013
Primary Phone	123-233-2123	Alternate Phone	N/A
Cell Phone	N/A	Scheduled	00 Hrs : 30 Mins
Scheduled Date	6/1/2016 4:39:46 AM	Duration	
Address	708 MAIN ST	Care Staff	Altruista Health
State	KS	City	QUINTER
Zip	67752		
Activity Outcome	Select		
Actual Duration	00 Hrs : 30 Mins		
Outcome Notes	<div></div>		
Complete			

Select the **Activity Outcome** and enter **Outcome Notes**. Click **Complete** to complete the Activity.

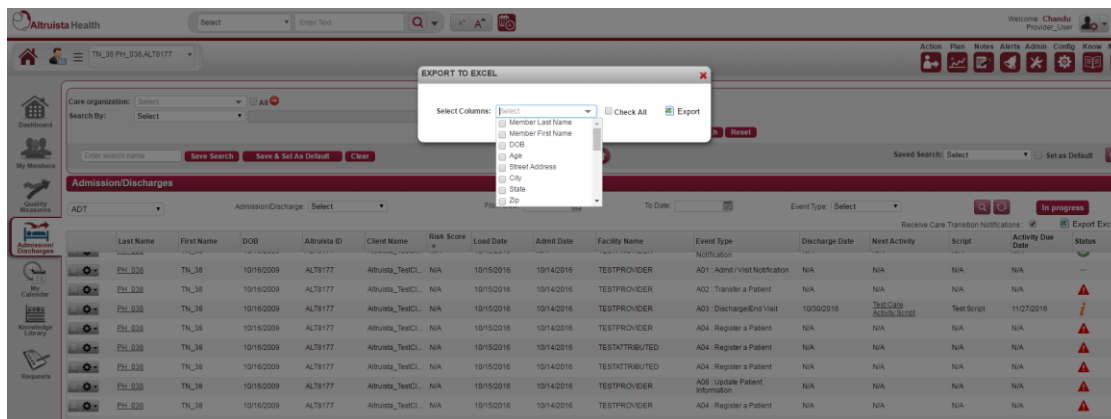
The Next Activity column in the grid is refreshed and the next configured required Activity will be displayed in the column.

3. Export ADT to Excel

ADT data can be exported to Excel by clicking the **Export Excel** icon.



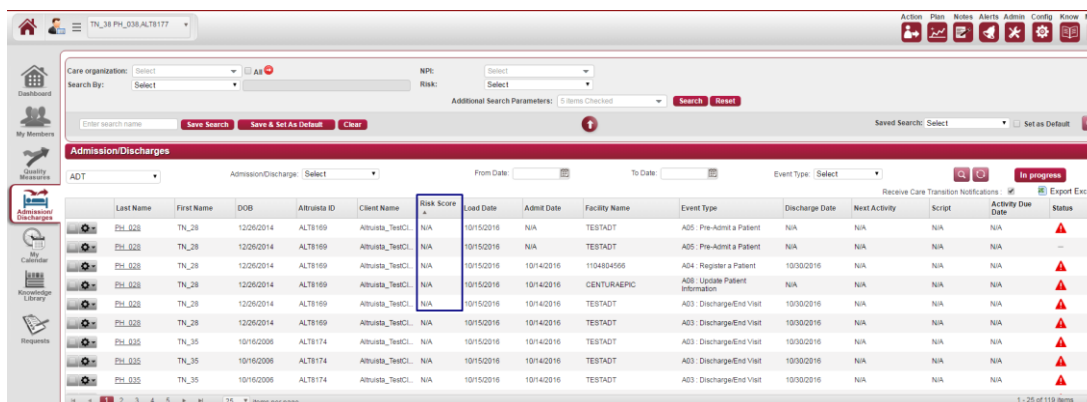
The screenshot shows the Altruista Health interface with the 'Admission/Discharges' tab selected. The table displays patient data with columns: Last Name, First Name, DOB, Altruista ID, Client Name, Risk Score, Load Date, Admit Date, Facility Name, Event Type, Discharge Date, Next Activity, Script, Activity Due Date, and Status. The 'Export Excel' button is located in the top right corner of the table area.



The screenshot shows the 'EXPORT TO EXCEL' dialog box open over the ADT table. The 'Select Columns' dropdown menu is expanded, showing options: Member Last Name, Member First Name, DOB, Age, Street Address, City, State, and Zip. The 'Check All' and 'Export' buttons are also visible.

4. Sort Members by Risk Score in ADT tab

Click on the **Risk Score** column to view members by ascending/descending order.



The screenshot shows the Altruista Health interface with the 'Admission/Discharges' tab selected. The 'Risk Score' column header in the table is highlighted with a blue box, indicating it is the target for sorting.